



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Status Hearing Re: Failure to File a First Account or Petition for Final Distribution.

DOD: 5/18/07	<p>ALICE HOUSTON, Daughter, was appointed Administrator with Full IAEA with bond of \$67,000.00 on 10/26/10.</p> <p>Bond was filed 3/21/11 and Letters issued on 3/29/11.</p> <p>A Final Inventory and Appraisal was filed 8/4/11 reflecting real property in Fresno valued at \$335,000.00.</p> <p>Thereafter, nothing was filed.</p> <p>The Court sent Notice of Status Hearing to the attorney and the Administrator on 3/9/16, and to the attorney at a new address on 3/24/16.</p> <p>Notice states both the attorney and the personal representative are ordered to appear at the hearing unless a first account or petition for final distribution has been filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution pursuant to Probate Code §12200 or written status report pursuant to Local Rule 7.5.</p>		
Aff.Sub.Wit.				
Verified				
Inventory				
PTC				
Not.Cred.				
Notice of Hrg				
Aff.Mail				
Aff.Pub.				
Sp.Ntc.				
Pers.Serv.				
Conf. Screen				
Letters				
Duties/Supp				
Objections				
Video Receipt				
CI Report				
9202				
Order				
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
		Reviewed by: skc		
		Reviewed on: 4/28/16		
		Updates:		
		Recommendation:		
		File 1- Tims		

Probate Status Hearing Re: First Accounting or Petition for Final Distribution

DOD: 10/3/1994	ROBERT L. JOHNSON was appointed Administrator without bond and with Limited IAEA authority on 7/31/12.	NEEDS/PROBLEMS/COMMENTS:
		Continued from 3/16/16. Minute order states Counsel represents that the Administrator's wife has been ill and he has not been able to obtain the final bank statements necessary for the final account.
Cont. from 100413, 121313, 032814, 072514, 111214, 042215, 060315, 080515, 101415, 120915, 021016, 031616	Letters issued 7/31/12.	1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	I & A filed on 9/11/12 shows an estate valued at \$40,000.00	
Aff.Sub.Wit.	Minute order dated 7/31/12 set a status hearing on 10/4/13 for the filing of the First Account or Petition for Final Distribution. Minute order indicates Mr. Rindlisbacher was present.	Examiner notes Sam Johnson Jr. survived the decedent (petition for probate indicates he died in 2004 or 2005) and declaration filed on 7/23/14 states Sam passed away after the decedent. Therefore, the estate of Sam Johnson Jr. is the other beneficiary of this estate and not his two children.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		Reviewed by: KT Reviewed on: 4/28/16 Updates: Recommendation: File 2 - Johnson
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Attorney
Attorney

Kruthers, Heather H. (for Public Administrator)

Milnes, Michael A. (for Contestants Hope De Santiago and Stephen Galvan)

Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization
to Administer Under the Independent Administration of Estates Act

DOD: 10/3/11		FRESNO COUNTY PUBLIC ADMINISTRATOR is Petitioner and requests appointment as Administrator with Will Annexed with Full IAEA without bond. Full IAEA – ok Will dated 8/11/09 Residence: Fresno Publication: Business Journal Estimated value of estate: Real property: \$311,000.00 Probate Referee: Rick Smith Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative was filed 3/16/16. See Page 2.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 4/6/16: Mr. Milnes is admonished to address the defects in the will contest.</u> <u>Note: Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative was filed 3/16/16; however, it does not appear that a summons was submitted therewith for issuance pursuant to Probate Code §8250, and because the document indicated this continued hearing date of 4/6/16, the Contest was not assigned it's own separate hearing date at the counter.</u> <u>Due to notice requirements, the Contest cannot be heard on 5/4/16. The Court will set the Contest for noticed hearing pursuant to Probate Code §8250 at this time.</u> <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	
Cont. from 121515, 012716, 030216, 040616				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
✓	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
✓	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
✓	Letters			
<input type="checkbox"/>	Duties/Supp			
✓	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
✓	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc Reviewed on: 4/28/16 Updates: Recommendation: File 3 - Galvan				

Contest and Grounds for Objection to Probate of Purported Will & of Appointment of Personal Representative filed 3/16/16 BY Hope De Santiago and Stephen Galvan, daughter and son, states:

A document dated 8/11/09 purporting to be the last will was filed in this court on 11/9/11. Petitioners are informed and believe and thereon allege that the decedent left no valid Will. Probate of the purported will should be denied on the following grounds:

1. The decedent was not of sound and disposing mind and therefore lacked testamentary capacity at the time of the alleged execution of the purported will.
2. At the time of signing, the decedent was fluent in the Spanish language and not the English language use dint he purported will, and the decedent was not able to read or understand documents written in the English language. As a result, the decedent was not able to understand or comprehend the meaning and effect of the English words used in the purported will and their significance, therefore the decedent lacked testamentary intent and the signature of the decedent to the purported will was executed by the decedent under a mistake as to its legal effect.
3. Petitioners allege the purported will is not and never was the decedent's will as it was made as a direct result of undue influence on the decedent by his son, **ARTHUR G. GALVAN**, and other members of his family, and it is now (sic) and never was the will of the decedent.

See contest for description of the undue influence.

Contestants also object to appointment of the Public Administrator. Petitioners state on 5/10/13, the PA was appointed under Probate Code §7660 in **13CEPR00400** and since that date has served in that capacity. In connection with this new appointment, the PA failed to give proper notice to the intestate heirs

NEEDS/PROBLEMS/COMMENTS:

1. **Petitioner lists only the decedent's four living children at #8; however, it appears that there are additional people entitled to notice of this proceeding, including:**

- Vanessa Galvan (Daughter of deceased son Frank Garcia Galvan, mentioned in the will)
- Vivian Saicon (Granddaughter and Named alternate executor and former conservator of the person)

Therefore, need revised declaration re #8 and proof of service of Notice of Petition to Administer Estate on Vanessa Galvan and Vivian Saicon at least 15 days prior to the hearing per Probate Code §8110.

Note: Petitioner's #8 indicates that the will provides for distribution to a trust; however, that does not appear to be the case. Need clarification.

2. **Need date of death of Frank Garcia Galvan per Local Rule 7.1.1.D. Note: Declaration filed 2/26/16 indicates a date of death for a David Garcia Galvan. Is this a typo? There is no David listed at #8.**

Note: If granted, the Court will set status hearings as follows:

- Wednesday Oct. 5, 2016 for filing Inventory and Appraisal
- Wednesday July 5 2017 for filing the first account or petition for final distribution

Atty Chielpegian, Mark E. (for Casey S. Rogers – Trustee – Petitioner)

Atty Keeler, William J. (for Susan Ford Frantzich)

Petition for Order Approving Settlement Agreement; and for Order Determining Distribution Provisions of Trusts

			CASEY S. ROGERS , Trustee, is Petitioner and requests that this Court enter an Order Approving the Settlement Agreement and Mutual Release of All Claims entered into by and among: Trustee Casey S. Rogers, Patricia Elaine Coffman, and Susan Jean Frantzich as set forth in Exhibit A. See petition and settlement agreement for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 4/28/16
				Updates:
				Recommendation:
				File 4- Ford

Attorney
Attorney

Wright, Janet L (for Dan Habib – Conservator of the Estate)

Kruthers, Heather H. (for Public Guardian – Conservator of the Person)

Status RE: Filing of the First Account

		DAN HABIB , Son, was appointed Conservator of the Estate with bond of \$294,360.00 on 1/26/15. Bond was filed and Letters issued on 2/17/16.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 3/30/16</u> : Counsel requests 30 days.
		The FRESNO COUNTY PUBLIC GUARDIAN was appointed Conservator of the Person on 1/26/15.	1. Need first account per Probate Code §2620.
Cont. from 033016		At the hearing on 1/26/15, the Court set this status hearing for the filing of the first account.	
Aff.Sub.Wit.			
Verified		Status Report filed 5/2/16 states it is expected that the petition will be filed on Tuesday, 5/3/16.	
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: skc	
		Reviewed on: 4/28/16	
		Updates: 5/2/16	
		Recommendation:	
		File 5- Habib	

Petitioner

Ward, Thresa Ann (Pro Per – Non-relative – Petitioner)

Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<u>Minute Order 3/23/16</u> : Examiner notes provided in open court.
			The following remains noted:
			1. Petitioner filed declarations of due diligence re the father, paternal grandparents, and maternal grandfather. If diligence is not found, need notice per Probate Code §1511.
Cont. from 121615, 021716, 032316			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	DSS Report		
✓	Clearances		
✓	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 4/28/16
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 6 - Franklin

Petitioner Gonzalez, Ana Matilde (Pro Per – Guardian – Mother)

Probate Status Hearing RE: Receipt for Blocked Account

Age: 16	ANA MATILDE GONZALEZ, was	NEEDS/PROBLEMS/COMMENTS:
DOB: 12/18/1999		
	appointed Guardian of the Estate with	1. Need Receipt for Blocked
	\$100,000 to be placed into a Blocked	
	Account on 03/23/2016.	Account or current written status
	Letters issued 03/23/2016.	report pursuant to Local Rule 7.5
Cont. from		which states in all matters set for
Aff.Sub.Wit.	Minute Order of 03/23/2016 set this	status hearing verified status
Verified	Status Hearing re: Receipt for Blocked	reports must be filed no later than
Inventory	Account.	10 days before the hearing.
PTC	Minute Order states: A blank receipt	Status Reports must comply with
Not.Cred.	form is provided to Petitioner in open	the applicable code
Notice of Hrg	Court. The Court orders that upon	requirements. Notice of the status
Aff.Mail	receipt of the funds, the \$435 filing fee is	hearing, together with a copy of
Aff.Pub.	to be paid.	the Status Report shall be served
Sp.Ntc.		on all necessary parties.
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		Reviewed by: LV
Order		Reviewed on: 04/29/2016
Aff. Posting		Updates:
Status Rpt		Recommendation:
UCCJEA		File 7- Gonzalez
Citation		
FTB Notice		

8A Justin Vaden Breitwieser (GUARD/P)**Case No. 15CEPR01203**

Petitioner: Monica Letitia Rocha (pro per)

Petitioner: Jarod Edward Rocha (pro per)

Petitioner: Twyla G. Klein (pro per)

Objector: Soliel Phariss (pro per)

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES ON 5/4/16</u>	NEEDS/PROBLEMS/COMMENTS:	
		<p>MONICA LETITIA ROCHA, maternal grandmother, JEROD EDWARD ROCHA, maternal step-grandfather and TWYLA G. KLEIN, paternal great-grandmother, are petitioners.</p> <p>Please see petition for details.</p> <p>Objections of mother, Soliel Phariss, filed on 3/30/16</p> <p>Court Investigator Report filed on 3/23/16</p> <p>Declaration of Twyla G. Klein filed on 3/24/16</p> <p>Declaration of Twyla G. Klein filed on 4/11/16</p> <p>Declaration of Kenneth A. Klein filed on 4/11/16</p> <p>Declaration of father, Justin Breitwieser filed on 4/11/16</p>	<p>Continued from 3/30/16. Minute order states the Court orders that Soliel Phariss, mother, is not to reside in the Rocha's home. The Rocha's are to obtain counseling for the minor with a child psychiatrist (PhD) and bring paper proof of appointments on 5/4/16 based on the parties reporting that the minor has become overly emotional about visiting Twyla Klein. The Court orders that Twyla can still have visitation but it must be supervised by either Monica Rocha or Jarod Rocha. Said visitation for Twyla shall be every Monday and Thursday from 11am to 1pm at the McDonalds on Herndon and Ingram, beginning 3/31/16. The Court orders that there is to be no discussion of this matter, nor any disparaging comments about the other parties made, in front of or to the minor. An additional responses must be filed and properly served by 4/20/16.</p> <p>1. Need Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act (UCCJEA).</p>	
Cont. from 021716, 033016				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA	X		
	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 4/28/16	
			Updates:	
			Recommendation:	
			File 8A - Breitwieser	

8A

Petitioner: Justin Earnest Breitwieser (pro per)

**Motion to Transport Prisoner to court; Memorandum of Points and Authorities;
Declaration in Support**

JUSTIN EARNEST BREITWISER , father, moves the court for an order under Penal Code §2625 for an order transporting him to court for the hearing on May 4, 2016.			NEEDS/PROBLEMS/COMMENTS:
Please see petition for details.			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 8B- Breitwieser

8B

Petition for Appointment of Guardian of the Person

See Petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<p><u>Minute Order 3/23/16</u>: Examiner notes provided in open court. The Court grants temporary orders; Letters are to issue forthwith. Petitioner is to make further attempts at service.</p> <p>As of 4/28/16, the following issue remains noted:</p> <p>1. Petitioner filed declarations of due diligence for the mother and the maternal grandfather on 3/8/16 and further diligence on 4/20/16.</p> <p>If diligence is not found, need personal service on the mother, and service on the maternal grandfather, of Notice of Hearing and proof of service at least 15 days prior to the hearing per Probate Code §1511.</p>
Cont. from 021616, 032316			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF/skc
			Reviewed on: 4/28/16
			Updates:
			Recommendation:
			File 9- Villanueva

Amended Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 12/27/2015		PAUL LAWRENCE DAVIS, brother/named executor without bond, is petitioner. All heirs waive bond. Petitioner is a resident of West Allis, Wisconsin. Full IAEA – o.k. Will dated 8/27/1980 Residence: Fresno Publication: Fresno Business Journal Estimated value of Estate: Personal property \$ 5,000.00 Annual gross income: \$ 0.00 Real property: \$ 75,000.00 Total: \$ 80,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: 1. Waivers of bond were filed 3/29/16 by Kim Fromm-Evans and Mardelle Fromm. However, they are not on the Judicial Council mandatory use forms (DE-142). 2. Proposed personal representative is a resident of Wisconsin. Probate Code 8571 states notwithstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the Court. Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> • Tuesday, October 4, 2016 for filing Inventory and Appraisal • Tuesday, August 8, 2017 for filing the first account or petition for final distribution
Cont. from 032316			
<input type="checkbox"/> Aff.Sub.Wit.	s/p		
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Reviewed by: SEF
Reviewed on: 4/29/16
Updates:
Recommendation:
File 11 - Davis

12

Ex Parte Petition for Appointment of Guardian Ad Litem

		<p>ALLIANCE UNITED INSURANCE GROUP is Petitioner and requests appointment of MARIDAUN DEFOREST, Parent, as Guardian ad Litem to represent the interests of STEVIE UNDERWOOD, a person with a disability within the meaning of Probate Code §3603.</p> <p>See petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED TO 5/26/16</u> Per attorney request</p> <p><u>Minute Order 3/30/16:</u> Counsel requests a continuance to address the defects.</p> <p><u>Note:</u> This petition was filed ex parte on 2/18/16. On 3/9/16, the Court ordered the ex parte petition set for hearing on 3/30/16 with 15 days' notice to interested parties. Order setting hearing was mailed to Attorney Berger on 3/10/16.</p> <p>As of 4/28/16, nothing further has been filed. The following issues remain noted:</p> <ol style="list-style-type: none"> 1. A person may not act as a guardian ad litem unless he or she is an attorney or is represented by an attorney. See NOTE at caption of the petition. 2. Need proof of service of Notice of Hearing on this Petition for Appointment of Guardian ad Litem at least 15 days prior to the hearing per Order of 3/9/16, including: <ul style="list-style-type: none"> - Stevie Underwood - Maridaun Forest - Other interested parties/agencies 	
Cont. from 033016				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 4/28/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13A- Underwood</p>		

Petition for Order Establishing Special Needs Trust

	<p>STEVIE UNDERWOOD, by and through her Guardian ad Litem MARIDAUN DEFOREST, is Petitioner.</p> <p style="text-align: center;">See petition for details.</p>		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED TO 5/26/16</u> Per attorney request</p> <p><u>Note:</u> Ms. DeForest's standing as GAL is contingent on her appointment pursuant to the petition at Page A.</p> <p><u>Minute Order 3/30/16:</u> Counsel requests a continuance to address the defects.</p> <p>As of 4/28/16, nothing further has been filed. The following issues remain noted:</p> <p style="text-align: center;"><u>SEE PAGE 3</u></p>
<p>Cont. from 033016</p>			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	X	
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
<p>Reviewed by: skc</p> <p>Reviewed on: 4/28/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13B- Underwood</p>			

NEEDS/PROBLEMS/COMMENTS:

1. Notice of Hearing was served only on the agencies required at Probate Code §3602(f), but was not served on the proposed beneficiary, the proposed trustee, the proposed alternate trustee, or any other interested persons. Therefore need continuance for proper notice to the following:
 - Proposed beneficiary Stevie Underwood
 - Proposed trustee Maridaun DeForest
 - Proposed alternate trustee Neoala DeForest
 - Other remainder beneficiaries (see #2 below)

Note: The Court may require clarification regarding the named alternate trustee Neoala DeForest. How is this person related to the beneficiary?

Note: Although Maridaun DeForest is technically the petitioner herein, she is not represented by the filing attorney, who in fact represents the insurance agency that will be funding the trust based on a settlement with Ms. DeForest on Ms. Underwood's behalf. Therefore, despite Probate Code §1201 not requiring notice to self, it appears notice to Ms. DeForest is appropriate in this instance.

2. The trust at Article Six, provides that if the beneficiary leaves no spouse or issue, then her mother, Maridaun DeForest, is the remainder beneficiary. However, pursuant to intestate succession §6402(b), both parents would be her heirs. Therefore, need clarification regarding the omission of Stevie Underwood's father from this section. Notice of Hearing should also be given to the father as an interested person.
3. It is the policy of the Court to require Court approval for major purchases (over \$2,000.00), which after purchase become assets of the trust. See Local Rule 7.19.B. It appears this language should be added to Article Three. Need revised proposed trust.
4. The trust should include a "Schedule A" which lists the assets that will fund the special needs trust. See Local Rule 7.19.A.

Note: Given the proposed value (\$13,500.00), the Court may require further information regarding Petitioner's plans for use of the funds. Does Petitioner intend to make one or a few large purchases, such as a vehicle or a residence (per Article Seven, Section 5), or does Petitioner intend to maintain the funds in the trust for smaller special needs of the beneficiary?

5. Petitioner requests bond be waived pursuant to Probate Code §§ 2323, 2628 given the value of the trust (See Article Eight, Section 1; Cal. Rule of Court 7.903(d); however, it is the policy of the Court to require blocked account in lieu of bond. Therefore, if bond of \$14,850.00 is not required pursuant to Cal. Rules of Court 7.903(c), 7.207, Probate Code §2320(c), need Order to Deposit Money Into Blocked Account (MC-355), and the Court will set a status hearing for the filing of the receipt (MC-356).

SEE ADDITIONAL PAGES

NEEDS/PROBLEMS/COMMENTS (Cont'd):

6. Petitioner requests the Court waive accountings (See Article Eight, Section 4) pursuant to Cal. Rule of Court 7.903(d), given the value of the trust; however, it is the policy of the Court to require at least a first account pursuant to Probate Code §2620(a) prior to waiver of *further* accounts. See Local Rule 7.8 re blocked accounts. If a first account is required, the Court may set a status hearing for its filing.
7. Need order. Local Rule 7.1.1.F.

Note: If granted, the Court may set status hearings as follows:

- Wednesday, June 15, 2016 for the filing of bond of \$14,850.00 or receipt for blocked account (MC-356), as required.
- Wednesday, July 5, 2017 for the filing of the first account, if required.

If the proper items are on file, status hearings may come off calendar. See Local Rule 7.5.

Petition for Probate of Will and for Letters Testamentary and Authorization to Administer under IAEA

DOD: 10/26/2015			JESUS MARTINEZ SALDANA , son, is petitioner and requests appointment as Executor without bond Full IAEA – o.k. Will dated 9/10/2010 – (see note 1) Residence: Fresno Publication: Business Journal	NEEDS/PROBLEMS/COMMENTS: 3. The petition lists decedent's will dated 9/10/2010. However, the <i>Order</i> requests the will dated 9/28/2010 be admitted to probate and the copy of will attached to the petition is dated 9/28/2010. Need clarification. 4. Petitioner signed <i>Letters</i> , but did not check affirmation box at item 2. Need new <i>Letters</i> .
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.	s/p		
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail	w/		
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters	x		
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Estimated value of Estate:	
Personal property	\$ 0.00
Annual gross income:	\$ 0.00
Real property:	\$ 251,000.00
Total:	\$ 251,000.00

Probate Referee: Steven Diebert

Reviewed by: SEF
Reviewed on: 4/29/16
Updates:
Recommendation:
File 14- Martinez

Petition for Letters of Administration; Authorization to Administer under IAEA

DOD: 2/11/16		ROSA E. VELAZCO , Spouse, is Petitioner and requests appointment as Administrator with Full IAEA without bond. All heirs waive bond. Full IAEA – ok Decedent died intestate Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: \$1,215,470.00 Real property: \$1,154,567.00 Total: \$2,370,037.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> Wednesday Oct. 5, 2016 for filing Inventory and Appraisal Wednesday July 5 2017 for filing the first account or petition for final distribution
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc

Reviewed on: 4/28/16

Updates:

Recommendation: SUBMITTED

File 17- Velazco

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer under IAEA

DOD: 3/14/16		DAN CHARLES GILBERT , Son and Named Alternate Executor without bond, is Petitioner. Full IAEA – ok Will dated 7/27/09 Residence: Fresno Publication: Business Journal Estimated value of estate: Real property: \$500,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> • Wednesday Oct. 5, 2016 for filing Inventory and Appraisal • Wednesday July 5 2017 for filing the first account or petition for final distribution 	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
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<input checked="" type="checkbox"/>	Notice of Hrg			
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<input type="checkbox"/>	Pers.Serv.			
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<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
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<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc Reviewed on: 4/28/16 Updates: Recommendation: SUBMITTED File 18- Gilbert	

Petitioner: Alma Meza (Pro per)

Petitioner: Lucila Martinez (Pro per)

Petition for Appointment of Probate Conservator of the Person

NO TEMPORARY REQUESTED			NEEDS/PROBLEMS/COMMENTS:		
<p>LUCILA MARTINEZ and ALMA MEZA, half-sister and niece, are petitioners and request appointment as co-conservators of the person</p> <p>Court Investigator report filed 4/27/16.</p> <p><i>See petition for details.</i></p>			<p>1. Declaration of due diligence was filed as to Rosa De Loya (mother). If court does not excuse notice, need proof of mailed service 15 days before the hearing of the <i>Notice of Hearing</i> with copy of petition on Rosa De Loya.</p> <p>2. Proof of mailed service of <i>Notice of Hearing</i> filed 4/4/16 shows that Manuel Martinez (half sibling) was noticed at:</p> <p>6148 Heliotrope Avenue, <u>Hollywood</u> CA 90270</p> <p>However, his address in listed in the petition as:</p> <p>6148 Heliotrope Avenue, <u>Maywood</u> CA 90270.</p>		
				Cont. from	
				✓ Aff.Sub.Wit.	
				✓ Verified	
				Inventory	
				PTC	
				Not.Cred.	
				✓ Notice of Hrg	
				✓ Aff.Mail	w/
				Aff.Pub.	
Sp.Ntc.					
✓ Pers.Serv.	w/				
✓ Conf. Screen					
✓ Letters					
✓ Duties/Supp					
Objections					
✓ Video Receipt					
✓ CI Report					
9202					
✓ Order					
Aff. Posting					
Status Rpt					
UCCJEA					
✓ Citation					
FTB Notice					
			Reviewed by: SEF		
			Reviewed on: 4/29/16		
			Updates:		
			Recommendation:		
			File 19- Martinez		

Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 4/11/16 Voting rights affected – need minute order. 1. The Capacity Declaration is incomplete at #7 re ability to consent to medical treatment – 7b is checked, but the doctor did not initial in the necessary space. 2. Need video receipt per Local Rule 7.15.8.A.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt	X		
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/29/16	
			Updates:	
			Recommendation:	
			File 20- Flores	

21 Reann Maldonado (CONS/P)**Case No. 16CEPR00349**

Petitioner: Christina Apolonia Maldonado (pro per)

Petitioner: James Edward Alvarado (pro per)

Petition for Appointment of Probate Conservator

			<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>CHRISTINA MALDONADO, mother and JAMES ALVARADO, cousin, are petitioners</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 4/26/16</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 4/13/16.</p> <p>Voting Rights affected need Minute Order.</p> <ol style="list-style-type: none"> 1. Dr. Neepa Ved's signature on the Capacity Declaration is not dated. 2. Need Conservatorship Video Viewing Receipt for both petitioners.
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt	X		
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			

Reviewed by: KT
Reviewed on: 4/29/16
Updates:
Recommendation:
File 21- Maldonado

Petition for Appointment of Temporary Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 4/18/16.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4/29/16
			Updates: 5/2/16
			Recommendation:
			File 22- Daly

Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a

First or Final Account

DOD: 3/4/1994	<p>TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.</p> <p>Letters issued on 1/17/1995.</p> <p>Inventory and Appraisal was due June 1995.</p> <p>Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.</p> <p>First account or petition for final distribution was due March 1996.</p> <p>Minute Order dated 1/20/16 states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.</p> <p>Letters for the Public Administrator issued on 4/22/16</p> <p>Status Report filed on 4/14/16 states the Court appointed the Public Administrator as Successor Administrator. This matter was assigned to Deputy Public Administrator Scott Stacy. He reports the following information:</p> <p>He talked to him on the phone approximately four times, one of which while he was in the hospital. He arranged for him to come to the Public Administrator's Office about three weeks ago, but he did not show up and he has not been able to contact him since. He has left a couple of messages for him. He has not be able to get him to turn over anything that he did regarding the estate prior to his removal. He doesn't know what assets there may be in the estate due to the former administrator's lack of cooperation.</p> <p>The Public Administrator does not have any information with which to file an Inventory and Appraisal or final account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Status Report was not served on all necessary parties. Local Rule 7.5B.</p>
Cont. from 042016		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 4/28/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23- Tucker</p>

Petition for Appointment of Temporary Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Alfredo Romero (Father)
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4/29/16	
			Updates:	
			Recommendation:	
			File 24- Romero	

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 6/27/16</u>	NEEDS/PROBLEMS/COMMENTS:
		ROSA LINDA MUNOZ , maternal grandmother, is petitioner.	
Cont. from		Please see petition for details.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W/	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/29/16
			Updates:
			Recommendation:
			File 25- Galvan